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World Production and Trade

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The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

GRAIN AND FEED

KUWAIT recently made its first purchase of U.S. white wheat in several years. This sale of 15,000 tons for delivery this month came after samples of U.S. wheat were submitted for testing. If this shipment meets Kuwaiti expectations, it could pave the way for additional U.S. sales in the Arabian Gulf area. Coming in the wake of a recent 100,000-ton commercial purchase of U.S. white wheat by Yemen, this development indicates the growing competitiveness of U.S. white wheat in markets traditionally supplied by Australia.

The EUROPEAN COMMUNITY (EC) continues to market its wheat aggressively with sales to distant markets such as Brazil and Korea. To facilitate the 50,000-ton sale to Brazil, the EC has opened its Special Zone IV tender (South America) for the first time in more than a year. The French feed wheat sale of 52,000 tons to Korea could mean less Korean imports from Australia, which virtually cornered the Korean feed wheat market last year.

After a six-week hiatus, the EC has resumed its weekly export tenders by authorizing nearly 600,000 tons of soft wheat for export with a \$12 per ton subsidy. That brings total export authorizations to 4.7 million tons thus far in 1984/85, the same pace as last year, when the EC exported record quantities of wheat. Requests for export authorizations have exceeded a million tons in each of the past few weeks, an indication of EC exporters' strong desire to move surplus wheat.

Grain production in DENMARK for 1984/85 is estimated at a record 9.5 million tons, 48 percent above the 1983/84 crop, according to the U.S. agricultural counselor in Copenhagen. The wheat crop is estimated at 2.4 million tons, 53 percent higher than last season. Production of coarse grains is expected to total about 7.1 million tons, up 46 percent. The production increases are primarily due to record crop yields.

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TUNISIA's 1984/85 total grain production is estimated at 1.02 million tons, up 11 percent from last year's drought-reduced harvest, according to the U.S. agricultural officer in Tunis. The increase in grain production is attributed to generally favorable weather conditions that helped boost yields from last year's low levels. Wheat production is estimated at 711,000 tons, up 15 percent from last season. Adequate rainfall during September and October 1984 has allowed proper seedbed preparation for the 1985/86 crop.

DAIRY, LIVESTOCK AND POULTRY

State and collective farms in the SOVIET UNION continue to report significantly higher meat, milk and egg production, according to the U.S. agricultural attache in Moscow. For the January-October period, total meat production was up 6 percent. Beef was up 5 percent, pork up 8 percent and poultry up 5 percent. For the same period, production of milk and eggs was up 1.5 and 2.8 percent, respectively. Except for sheep and goats, which were down slightly, November 1 livestock numbers were also reported at record levels. Total cattle numbers were reported at 95.1 million head, 2 million above the year-earlier level. Hog numbers were reported at 61.5 million head, 1 percent above 1983. Poultry numbers reported at 748 million were 20 million above 1983, significantly larger than the 12-million increase reported on October 1.

For the month of October, total meat and beef production were each up 3 percent, compared with October 1983. Pork production was down about 2 percent. Poultry meat production gained about 7 percent, the sharpest increase since January. October milk production was about 2 percent above the October 1983 level.

TOBACCO

WORLD 1984 total unmanufactured tobacco production is estimated at 6.1 million tons (farm sales weight basis), up 3 percent from the May estimate and 1 percent above the 1983 crop. The tobacco crop in China, the world's largest tobacco producer, is expected to total 1.5 million tons. In the United States, production is estimated at 786,722 tons, up 5 percent from the May forecast. Other major tobacco-producing countries with sizable increases include Bulgaria, Greece, the Philippines, Poland, the Republic of Korea, Canada, Pakistan and Malawi. Countries recording substantially reduced crops include the Soviet Union, Indonesia, Thailand, Yugoslavia, Mexico and Colombia.

World flue-cured tobacco in 1984 is estimated at 2.9 million tons, up 3 percent from the May estimate. China accounts for the largest increase and production is estimated at 1.3 million tons. The crop in the United States is also up and current indications are that the crop could total 389,000 tons. Canada's flue-cured crop is estimated at 88,610 tons, up 4 percent from May's forecast despite a comparable reduction in harvested area in the major producing region of southwestern Ontario. Decreased output in Thailand is more than offset by production increases for the Republic of Korea and the Philippines.

The 1984 world burley crop is estimated at 744,479 tons, up 3 percent from May. Output in the United States, the world's largest producer, is estimated at 331,000 tons, virtually unchanged from the previous forecast. The crop in Malawi is now estimated at 27,000 tons, down 8 percent from May. Favorable weather resulted in production increases in the Republic of Korea and Japan. The Philippine crop is up sharply due to an 11-percent increase in area, favorable growing conditions and improved farm management. Production is down significantly in Mexico, due to adverse weather and outbreaks of blue mold, and more moderately in Argentina as a result of unfavorable weather.

World oriental tobacco production is estimated at 938,479 tons, down slightly from May's forecast of 944,000 tons. Production increases in Bulgaria and Italy were offset by production declines in the Soviet Union and Greece.

World dark air/sun-cured tobacco production in 1984 is estimated at 1.1 million tons, up 14 percent from May's estimate. China accounts for the bulk of the increase; production is now estimated at 112,500 tons, 13 percent above the May forecast. Production increases were also registered in Burma, Mexico, Argentina, France and Poland.

World unmanufactured tobacco production for 1983 and 1984, by leaf type, is as follows in 1,000 tons:

Leaf Type	Revised 1983	Estimated 1984
Flue-cured	2,886	2,920
Burley	632	744
Oriental	961	938
Dark air/sun-cured	1,080	1,051
Light air-cured	284	238
Dark air-cured, cigar	179	169
Dark fire-cured	49	67
Total	6,071	6,127

FRUITS AND NUTS

In ITALY, 1984/85 citrus production is forecast at 3.0 million tons, 19 percent below the record 1983/84 harvest, but 20 percent above the 1982/83 crop, according to the U.S. agricultural counselor in Rome. The projected decline in this season's output is principally the result of the alternate bearing tendency of citrus trees, since weather and other production factors were mostly favorable. Citrus production, by type, is estimated as follows in 1,000 tons:

Type	1982/83	Revised 1983/84	Forecast 1984/85
Sweet oranges	1,498	2,299 1/	1,800
Tangerines	338	470	390
Lemons	630	855	750
Grapefruit	5	6	6
Others	40	45	40
Total citrus	2,511	3,675	2,986

1/ Includes about 350,000 tons withdrawn from the market.

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WASHINGTON, D.C. 20250

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Selected International Prices

Item	Nov. 20, 1984		Change from : previous week	A year : ago
ROTTERDAM PRICES 1/	\$ per MT	\$ per bu.	\$ per MT	\$ per MT
Wheat:				
Canadian No. 1 CWRS-13.5% 9/	191.50	5.21	+2.50	200.00
U.S. No. 2 DNS/NS: 14%....	175.00	4.76	-.50	185.00
U.S. No. 2 S.R.W.	163.00	4.44	+2.50	152.00
U.S. No. 3 H.A.D.....	191.00	5.20	0	200.00
Canadian No. 1 A: Durum 9/	208.00	5.66	+2.00	206.00
Feed grains:				
U.S. No. 3 Yellow Corn....	133.50	3.39	-.75	157.00
Soybeans and meal:				
U.S. No. 2 Yellow.....	248.25	6.76	-5.80	298.75
Brazil 47/48% SoyaPellets 4/	183.00	--	-2.00	273.00
U.S. 44% Soybean Meal....	167.00	--	-1.00	251.00
U.S. FARM PRICES 3/				
Wheat.....	126.02	3.43	-1.10	125.28
Barley.....	80.84	1.76	-2.30	93.70
Corn.....	102.76	2.61	0	128.74
Sorghum.....	89.51	4.06 6/	+.88	107.36
Broilers 4/.....	1147.71	--	-35.71	1296.78
EC IMPORT LEVIES				
Wheat 5/.....	50.40	1.37	+.85	75.60
Barley.....	55.35	1.21	-2.30	49.20
Corn.....	51.60	1.31	-2.65	40.90
Sorghum.....	63.30	1.61	-3.35	57.00
Broilers 4/ 6/ 8/.....	165.00	--	-2.00	249.00
EC INTERVENTION PRICES 7/				
Common wheat(feed quality)	144.65	3.94	-1.15	167.80
Bread wheat (min. quality) 7/	154.25	4.20	-1.25	183.85
Barley and all				
other feed grains.....	144.65	--	-1.15	167.80
Broilers 4/ 6/.....	1114.00	--	-3.00	1142.00
EC EXPORT RESTITUTIONS (subsidies)				
Wheat	12.40	.34	+.90	40.40
Barley.....	27.60	.60	+.90	N.A.
Broilers 4/ 6/ 8/.....	97.00	--	-1.00	170.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Twelve-city average, wholesale weighted average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ April-May. N.A.=None authorized. N.Q.=Not quoted. Note: Basis December delivery.